



## Results of the Craft Beer Consumer Survey August 7-11, 2017

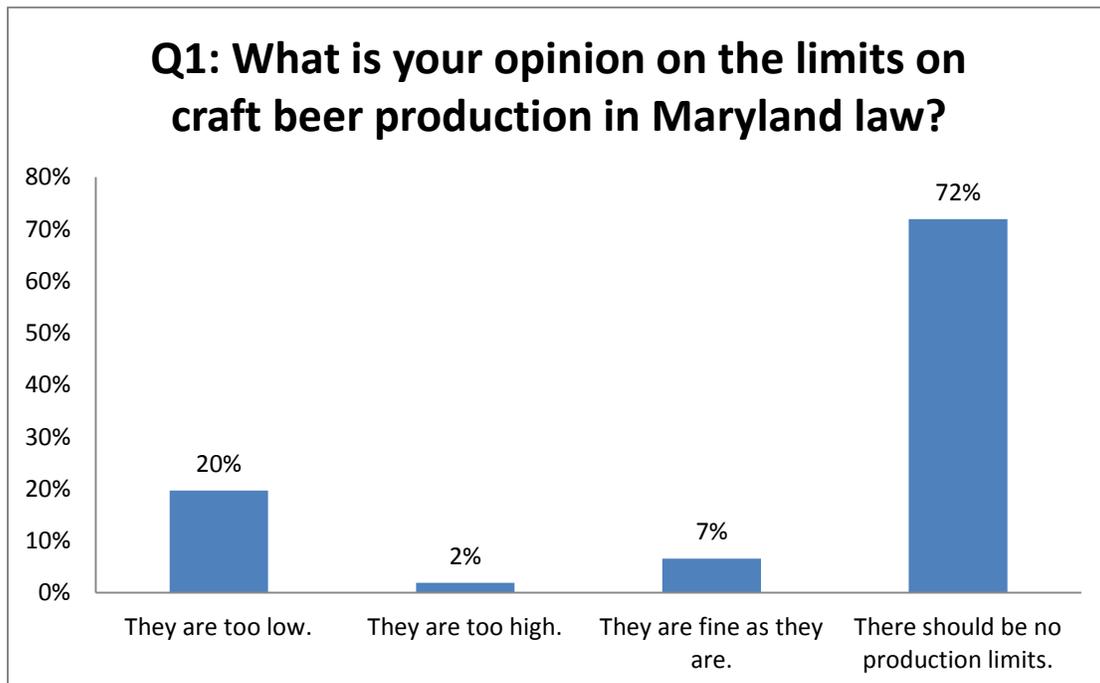
### BACKGROUND

The Office of the Comptroller administered an online, unscientific six-question poll which sought public input on topics and issues that the Reform on Tap Task Force has addressed to date. The poll was live from Monday, August 7, 2017 until Friday, August 11, 2017.

**2,472** respondents completed the poll during the survey period. The results of the survey are summarized below.

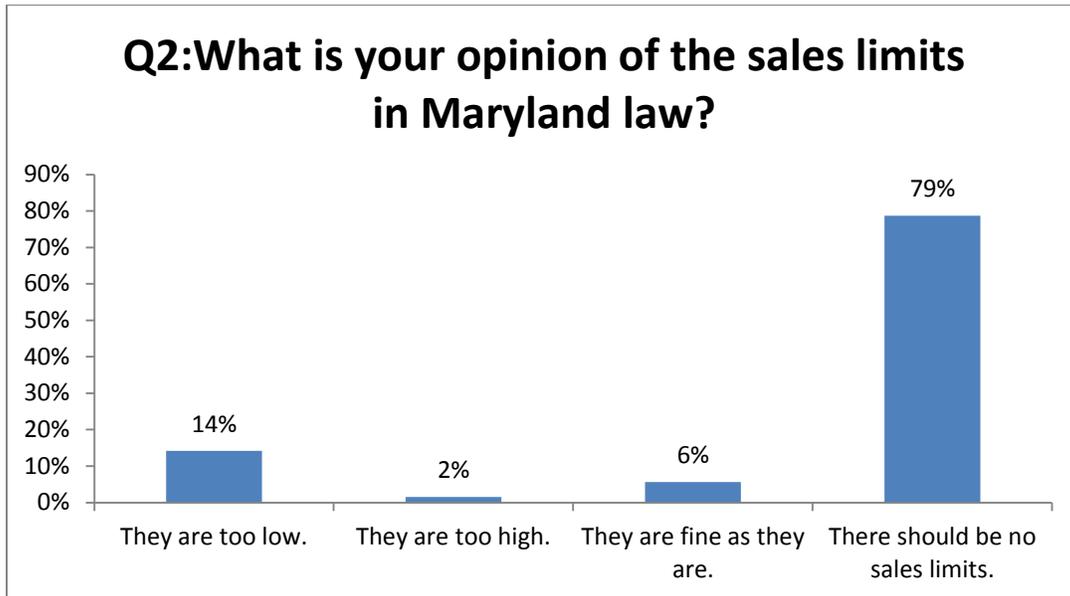
#### Q1: WHAT IS YOUR OPINION ON THE LIMITS ON CRAFT BEER PRODUCTION IN MARYLAND LAW?

72% of respondents indicated that there should be no limits on beer production; while an additional 20% answered that they are too low. The remaining 8% said either they are either too high as they are, or that they are “fine” at current levels.



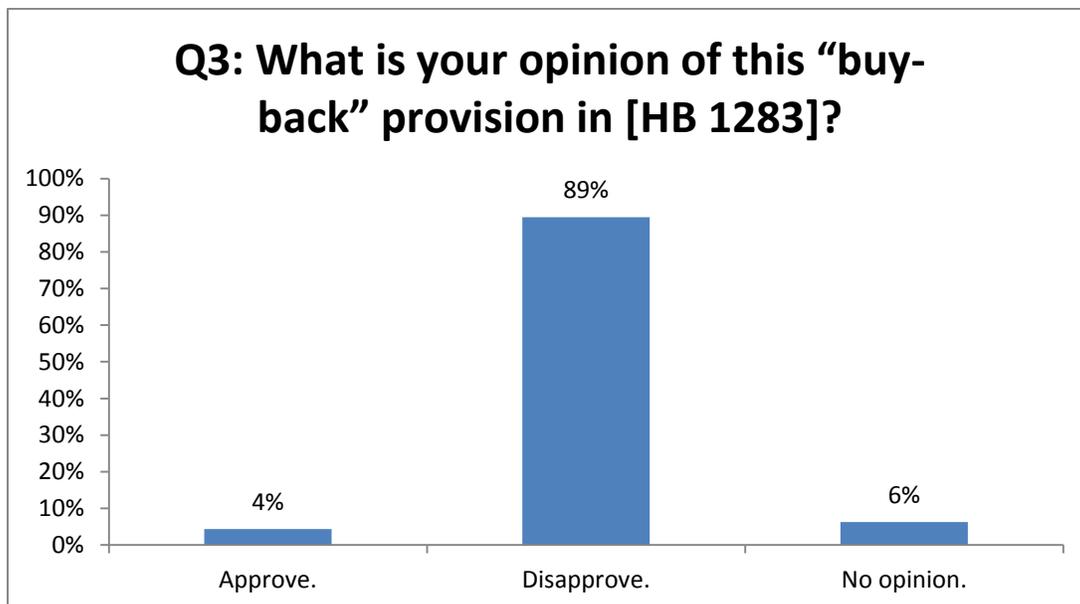
**Q2: WHAT IS YOUR OPINION OF THE SALES LIMITS [IMPOSED ON THE SALE OF BEER WITHIN BREWERIES' OWN TAPROOMS] IN MARYLAND LAW?**

79% of respondents indicated that there should be no sales limits; while 14% answered that these limits are too low. The remaining 7% of respondents said either they are too high as is, or they are “fine” at current levels.



**Q3: WHAT IS YOUR OPINION OF [THE CRAFT BEER] “BUY-BACK” PROVISION IN MARYLAND LAW?**

89% of respondents expressed their disapproval of this buy-back provision in House Bill 1283. 4% answered that they approved, while 6% indicated that they had no opinion.



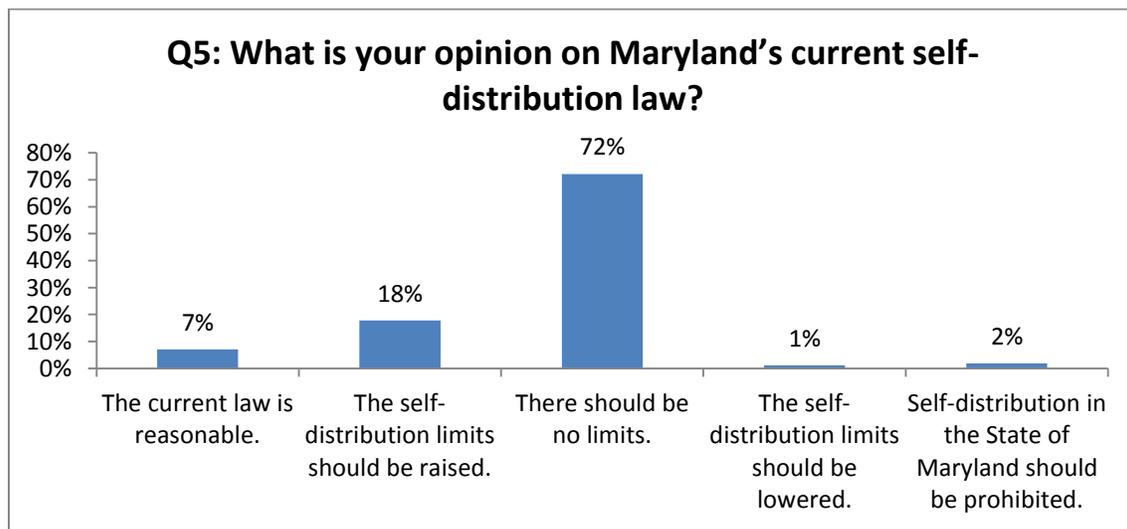
**Q4: SHOULD THE BUSINESS RELATIONSHIP BETWEEN THE BREWER AND THE DISTRIBUTOR BE GOVERNED BY MARYLAND STATE FRANCHISE LAW, OR SHOULD IT BE SUBJECT TO A PRIVATE CONTRACT THAT IS NEGOTIATED AND SIGNED BY BOTH PARTIES?**

83% of respondents indicated that the relationship should be governed by a “negotiated, signed contract.” 10% answered that it should be governed by state franchise law. 7% answered that they had no opinion on the matter.



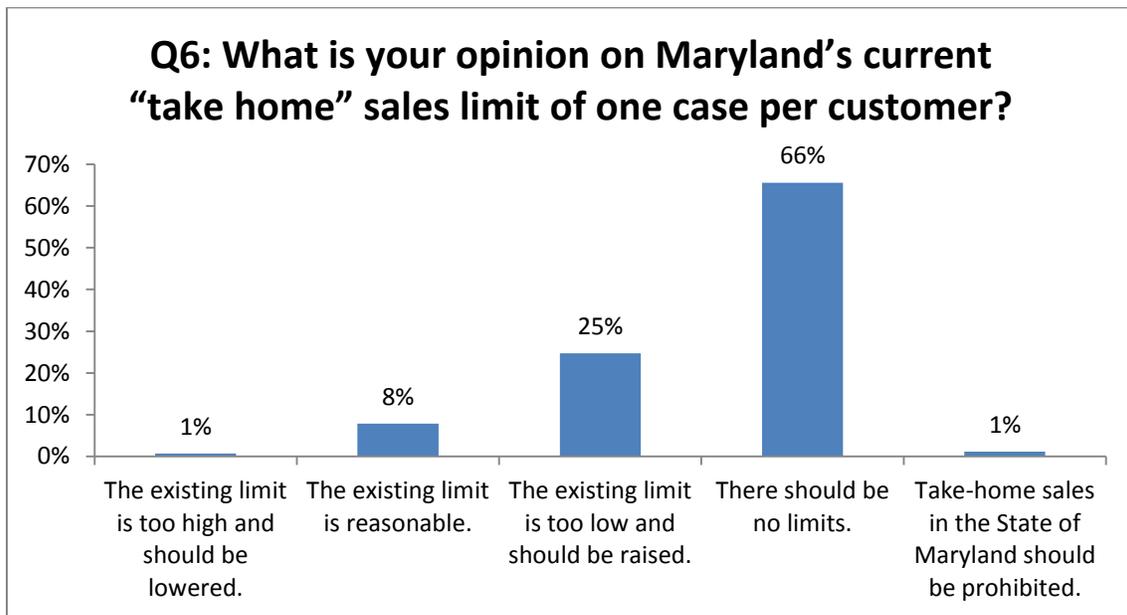
**Q5: WHAT IS YOUR OPINION ON MARYLAND’S CURRENT SELF-DISTRIBUTION LAW?**

72% of respondents indicated that there should be no such self-distribution limits, while 18% indicated that the limits should be raised. 7% said current law is reasonable, 1% said the limits should be lowered, and 2% said self-distribution should be prohibited altogether in the State of Maryland.



**Q6: WHAT IS YOUR OPINION ON MARYLAND’S CURRENT “TAKE HOME” SALES LIMIT OF ONE CASE PER CUSTOMER?**

66% of respondents indicated that there should be no take-home sales limit. 25% answered that the existing limit is too low and should be raised. 8% answered the existing limit is reasonable. Of the remainder of respondents, 1% said take-home sales in the State of Maryland should be prohibited altogether, and less than 1% said the existing limit is too high and should be lowered.



*\*Figures may not add to exactly 100% due to rounding for ease of understanding.*

**DEMOGRAPHICS OF RESPONDENTS**

Respondents had the opportunity to provide demographical information at the conclusion of the survey, and a vast majority of the respondents did provide responses to these questions. Of the 2,472 respondents who completed the survey, 2,418 provided their gender, 2,426 identified an age group, and 2,431 provided information on their county of residence. Of the 2,431, 19 were non-Maryland residents and were therefore excluded from this analysis.

The largest jurisdiction represented on this survey is Montgomery County (534 respondents, 22%). Jurisdictions with more than 100 respondents are highlighted in the table on page 5.

Gender	Number of Responses	Percentage of Responses
Male	1,797	74.32%
Female	621	25.68%

Age Group	Number of Responses	Percentage of Responses
21-29	281	11.58%
30-39	709	29.23%
40-49	526	21.66%
50-59	463	19.08%
60 or older	446	18.38%

Jurisdiction	Number of Responses	Percentage of Responses
Allegany	47	2%
Anne Arundel	228	9%
Baltimore County**	301	12%
Baltimore City**	280	12%
Calvert	21	1%
Caroline	4	0%
Carroll	62	3%
Cecil	10	0%
Charles	19	1%
Dorchester	9	0%
Frederick	271	11%
Garrett	7	0%
Harford	189	8%
Howard	192	8%
Kent	6	0%
Montgomery	564	23%
Prince George's	73	3%
Queen Anne's	23	1%
St. Mary's	20	1%
Somerset	0	0%
Talbot	25	1%
Washington	38	2%
Wicomico	18	1%
Worcester	5	0%

**NOTE:** Figures may not add to exactly 100% due to rounding for ease of understanding.

**\*\*Due to the wording of this question regarding county residence, respondents answering "Baltimore City" were counted under Baltimore City while respondents answering either "Baltimore County" or "Baltimore" were counted under Baltimore County.**